

# How to use QuickDOC to prepare MAHSLIN ILL Reports

You can use the QuickDOC Reports (Version 2.1.1 and later) to prepare the annual MAHSLIN ILL Reports. The steps to accomplish this are as follows (using the Borrow side as an example):

1. Check that your Library records have appropriate Library Groups assigned.

First print out the **Summary Borrow Report (by Library)**, and the **Summary Lend Report (by Library)** for the year to be reported. This step is to ensure that the proper Library Groups are assigned to the proper Libraries. Here is a typical first print:

Summary Borrow Report (by Library)							
(01-Jan-02 to 31-Dec-02)							
Check All Libraries (Borrow & Loan) for period.							
5-Mar-2003	Beth Israel Deaconess Medical Center (01-Jan-02 to 31-Dec-02)						Page 1
Library No.	Lender's LIBID			Items Borrowed	Charge		Lib #
1	AZUARI	University Of Arizona		1	\$11.00		1
2	CAUCLA	University Of California, Los Angeles		1	\$11.00		2
3	CAUCSF	University Of California San Francisco		1	\$11.00		3
4	CAULVI	St Vincent Medical Center (OUT\$)		1	\$8.00		4
5	CTUCON	Uconn Health Ctr/L M Stowe Library (R8\$)		9	\$110.00		5
6	CTUHHH	Hartford Hospital (R8)		1	\$0.00		6
7	CTUYAL	Yale University (R8\$)		3	\$33.00		7
8	FLUMIA	University Of Miami School Of Medicine		1	\$11.00		8

A number of these Libraries haven't yet had Groups assigned. Although it's perfectly acceptable to leave some Libraries without a Group, if you want to track activity by Group then you should assign one Group to each Library. In the case above, for MAHSLIN Libraries, the unassigned libraries above should be either OUT (for outside of Region 8, no charge) or OUT\$ (for outside of Region 8, charging).

For MAHSLIN Reports, all Libraries should have one of the following **Major Library Groups** (and only **one** Major Library Group, although any number of non-major groups can be added) assigned:

MA	- Mass Library, non-charging
MA\$	- Mass Library, charging
R8	- Region 8 Library, outside Mass., non-charging
R8\$	- Region 8 Library, outside Mass., charging
OUT	- Outside Region 8 Library, non-charging
OUT\$	- Outside Region 8 Library, charging
COMML	- Commercial Vendors

As an acknowledgment to earlier record-keeping requirements, you might also continue assigning Major Library Groups R1 (Region 1 Library, non-charging,

counted with the OUT Group); R1\$ (Region 1 Library, charging, counted with the OUT\$ Group); and NLM (NLM transactions, counted with OUT\$). But for MAHSLIN ILL Reporting, these can just as easily go with the appropriate OUT Library Group.

**Groups other than the MAHSLIN Major Groups.** There are also any number of special groups that can be assigned to any library to indicate membership in a variety of mutual relationships and activities. But these should be additional to the Major Groups, not assigned on their own. Any number of special Library Groups can be added to any one Library, but you should add only one Major Library Group (a Group you wish to be discriminative in Group Reports) to any Library Record.

## 2. Check your Library Groups List for errors or duplication.

The third page of **Compute Totals** (in Borrow; it's the second page in Loan) shows the distribution of items by Library Group, by Delivery Method:

Library Group Report - By Del Method (Borrowing)												
Library Group	TOTAL ITEMS	Group % Total	Physical Delivery: (Mono/			Electronic Delivery:			% Item Sent To:	Turnaround		
			Mail	PkUp	Other A/V	Web	Ariel	Email	Fax	Elect	Library Patron	Avg # Days
OUT\$	28	16.37%	18		(2)			7	3	36%	28	5.8
③ OUT			Here's the Library Group Report - By Del Meth - before cleanup									
CELL\$	32	18.71%	23				1	3	5	28%	32	4.9
MA	59	34.50%	30					12	17	49%	59	2.3
R8\$	24	14.04%	18					4	2	25%	24	6.3
R1\$	19	11.11%	17		(1)			2		11%	19	7.9
R8	8	4.68%	7				1			13%	8	9.9
MA\$	8	4.68%	8								8	8.8
BBLQ	21	12.28%	8					9	4	62%	21	2.2
BBLFAX	15	8.77%	7						8	53%	15	.9
NLM												
E1	2	1.17%	2								2	9.5
MASSFAX	4	2.34%	1					2	1	75%	4	.3
Total in Groups:		220	139			2	39	40			220	
% of Groups Totals:			63.18%			0.91%	17.73%	18.18%				
[The totals for columns may be greater or less than item totals, since some Libraries may belong to many groups, others to none.]												
[The Group % Total column = that Group's share of the 171 items received during this period. Total percent may be > or < 100%]												
[There were 170 Items not filled in-house (i.e., not by MAUBET). (22 of these were filled by Lenders with no assigned Library Group.)												
[These need to be checked in the Summary Borrow Report]												

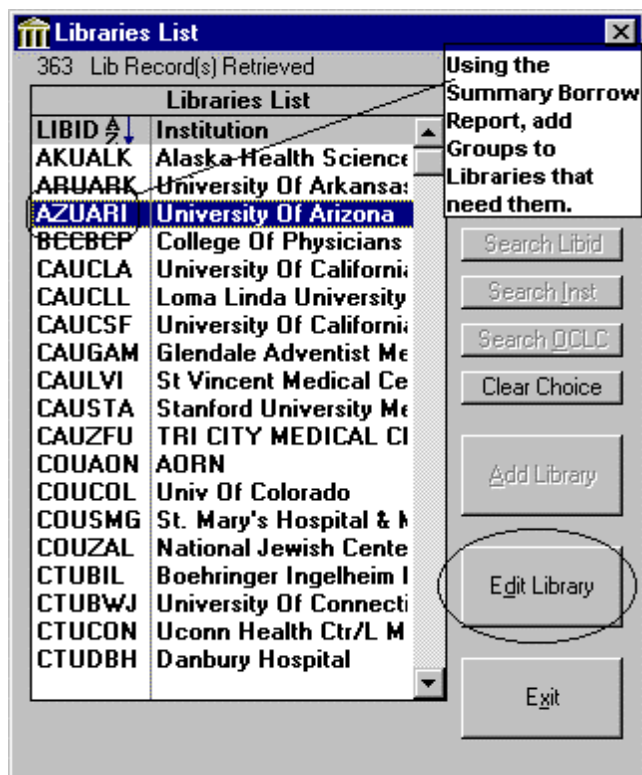
This report can be used to determine which Groups might be deleted or amalgamated before assigning Groups and printing reports. Note also the note at the bottom that there were 22 items that were filled by Libraries with no Library Groups attached. These will need to be checked. Here is the same report, by Source, which appears at the bottom of the same page in Compute Totals:

Library Group Report - By Source (Borrowing)										
Library Group	TOTAL ITEMS	Source: DOCLINE	LDOC	OCLC	RLIN	Phone	Fax	Mail	Other	Item Payment Via: EFTS IFM Other
OUT\$	28	23	5							6 17
OUT										
CELLS	32	30	2							
MA	59	56	3							
RS\$	24	20	4							15
R1\$	19	19								16
RS	8	8								
MA\$	8	8								4
BBLC	21	20	1							
BBLFAX	15	15								
NLM										
R1	2	2								
MASSFAX	4	3	1							
<b>Total in Groups:</b>	<b>220</b>	<b>204</b>	<b>16</b>							<b>41 17</b>
<b>% of Groups Totals:</b>		<b>92.73%</b>	<b>7.27%</b>							<b>18.64% 7.73%</b>

[The totals for columns may be greater or less than item totals, since some Libraries may belong to many groups, others to none.]

### 3. Edit Libraries to attach the appropriate Library Group(s).

Using the Summary Borrow Report printout, add Library Groups to Library Records that need them. From the Libraries List:



Choose each Library in turn and click Edit Library to get to the Library Information Form. On the Library Information Form, click on the Misc Tab to make Library Group changes:

**Library Information**

General Address Comms Charges **Groups**

**Groups Available** **Groups This Library**

OUT  
CELL5  
MA  
R8\$  
R1\$  
R8  
MA\$  
BBLC  
BBLFAX  
NLM  
R1  
MASSFAX

OUT\$

Use this button to move a highlighted group from this side to this side, then click Ok.

→

←

Add New Lib Group

Delete Group

Use this Form to Add (or Remove) Group Memberships for this Library.  
Select a new Group in the Left box and then click [--->] to add it.  
Select a current Group in the Right box and then click [<---] to remove it.

OK Apply

Cancel Delete Library

In the above example, the Library Group OUT\$ has been moved from the Groups Available list to the Groups This Library list. Click Ok to save the change and return to the Libraries List, moving to the next Library that needs editing.

4. Reprint the Summary Report, if necessary, to double-check Groups.

After using the Summary Borrow Report printout to add Groups to Libraries that need them, all libraries should have at least a Major Library Group.

Summary Borrow Report (by Library)						
01-Jan-02 to 31-Dec-02						
After revision, all the Libs have a Group assigned.						
5-Mar-2003	Beth Israel Deaconess Medical Center (01-Jan-02 to 31-Dec-02)					Page 1
Library No.	Lender's LIBID		Items Borrowed	Charge		Lib #
1	AZUARI	University Of Arizona (OUT\$)	1	\$11.00		1
2	CAUCLA	University Of California, Los Angeles (OUT\$)	1	\$11.00		2
3	CAUCSF	University Of California San Francisco (OUT\$)	1	\$11.00		3
4	CAULVI	St Vincent Medical Center (OUT\$)	1	\$8.00		4
5	CTUCON	Uconn Health Ctr/L M Stowe Library (R8\$)	9	\$110.00		5
6	CTUHHH	Hartford Hospital (R8)	1	\$0.00		6
7	CTUYAL	Yale University (R8\$)	3	\$33.00		7
8	FLUMIA	University Of Miami School Of Medicine (OUT\$)	1	\$11.00		8

Once we're sure that all libraries have at least one Major Group assigned, we can now print the Compute Totals Reports, for Lending and Borrowing, and use these to fill in the MAHSLIN ILL Report.

5. Print Compute Totals for Lending and Borrowing.

These printouts hold the information to be transferred to the MAHSLIN Form:

Compute Totals (Borrowing)													
01-Jan-02 to 31-Dec-02													
5-Mar-2003		Beth Israel Deaconess Medical Center (01-Jan-02 to 31-Dec-02)										Page 1	
Item Source	TOTAL ITEMS	Source % Total	Physical Delivery: (Mono/				Electronic Delivery:				% Item Sent To:	Turnaround	
			Mail	PkUp	Other	A/V	Web	Ariel	Email	Fax	Elect	Library Patron	Avg # Days
DOCLINE	154	90.06%	113			(3)		1	15	25	27%	154	5.7
LOANSOME DOC	16	9.36%	1						15		94%	16	1.9
DOCLINE & LD	170	99.42%	114			(3)		1	30	25		170	5.4
OCLC													
RLIN													
Mail													
Telephone													
Fax													
Other													
Copy Service	1	0.58%								1	100%	1	.
[Totals below do not include Copy Service items.]													
TOTAL REC'D:	170		114				1	30	25			170	5.4
% of Totals:			67.06%				0.59%	17.65%	14.71%				
LOANSOME DOC Activity: Total LD Items: 21													
LDX Requests Filled: Total LD Rec'd: 16													
Filled by MAUBET: 16													
Filled on DOCLINE: 16													
Not Filled: 5													
Physical 114													
Electronic 56													
TOTAL Physical & Electronic FILLS:			114						56			170	
% of Totals:			67.06%						32.94%				

This is the first page of the Compute Totals Report.

The Monograph, LDX Requests Filled and LDX Referred to DOCLINE totals are shown here. We can also see that 15 of the 16 LDs were received by Email. Enter this information onto the MAHSLIN Report Form.

MAHSLIN ILL STATISTICS 2003						
Monographs, LDs are filled in below						
Items Borrowed	DOCLINE	PHONE	OTHER	TOTAL	FILLED BY FAX	FILLED BY E-MAIL
MA FREE						
MA \$						
REGION 8						
REGION 8 \$						
OUTSIDE REGION 8 FREE						
OUTSIDE REGION 8 \$						
COMMERCIAL VENDORS						
TOTAL BORROWED						
MONOGRAPHS BORROWED	3					
LDX REQUESTS FILLED						
LDX Referred to DOCLINE	16					15

The third page of the Compute Totals Report has the rest of the information we need.

5-Mar-2003	Beth Israel Deaconess Medical Center (01-Jan-02 to 31-Dec-02)											Page 3
Library Group Report - By Del Method (Borrowing)												
Library Group	TOTAL ITEMS	Group % Total	Physical Delivery: (Mono/			Electronic Delivery:			%	Item Sent To:	Turnaround	
			Mail	PkUp	Other A/V	Web	Ariel	Email	Fax	Elect	Library Patron	Avg # Days
OUT\$	40	23.53%	26		(2)			10	4	35%	40	6.6
OUT	6	3.53%	6								6	6.2
CELLS	32	18.82%	23				1	3	5	28%	32	4.9
MA	59	34.71%	30					12	17	49%	59	2.3
R8\$	24	14.12%	18					4	2	25%	24	6.3
R1\$	21	12.33%	17		(1)			3	1	19%	21	7.5
R8	8	4.71%	7				1			13%	8	9.9
MA\$	8	4.71%	8								8	8.8
BBLC	21	12.35%	8					9	4	62%	21	2.2
BBLFAX	15	8.82%	7						8	53%	15	.9
NLM												
R1	4	2.35%	2					1	1	50%	4	5.
MASSFAX	4	2.35%	1					2	1	75%	4	.3
Total in Groups:	242		153				2	44	43		242	
% of Groups Totals:			63.22%				0.83%	18.18%	17.77%			
[The totals for columns may be greater or less than item totals, since some Libraries may belong to many groups, others to none.]												
[The Group % Total column = that Group's share of the 170 items received during this period. Total percent may be > or < 100%]												
[There were 170 Items not filled in-house (i.e., not by MAUBET). (0 of these were filled by Lenders with no assigned Library Group.)]												

This is the Delivery Method breakout. I've continued to use the R1 and NLM Groups, but when entering data onto the form I'll gather these into the OUT and OUT\$ totals.

To get the data necessary to fill out the rest of the form we also need the bottom of the third page, which is the breakout by source:

Library Group Report - By Source (Borrowing)										
Library Group	TOTAL ITEMS	Source: DOCLINE	LDOC	OCLC	RLIN	Phone	Fax	Mail	Other	Item Payment Via: EFTS IFM Other
OUT\$	40	32	8							9 21
OUT	6	6								
CELLS	32	30	2							
MA	59	56	3							15
R8\$	24	20	4							17
R1\$	21	21								4
R8	8	8								
MA\$	8	8								
BELC	21	20	1							
BELFAX	15	15								
NLM										
R1	4	3	1							
MASSFAX	4	3	1							
<b>Total in Groups:</b>	<b>242</b>	<b>222</b>	<b>20</b>							<b>45 21</b>
<b>% of Groups Totals:</b>		<b>91.74%</b>	<b>8.26%</b>							<b>18.60% 8.68%</b>
[The totals for columns may be greater or less than item totals, since some Libraries may belong to many groups, others to none.]										

Using both the Delivery Method and Source numbers, we can total up the first Group line, MA (which is Massachusetts non-Charging) as follows:

56 DOCLINE + 3 LDOC = 59 total for the DOCLINE column, with nothing for Phone or other. This comes from the Source spreadsheet. Use the Del Method spreadsheet to get the Filled by Fax and Filled By Email columns, which are 17 and 12, respectively. For the Compute Totals shown above, then, the following MAHSLIN Report would result:

MAHSLIN ILL STATISTICS 2003						
Monographs, LDs are filled in below						
Items Borrowed	DOCLINE	PHONE	OTHER	TOTAL	FILLED BY FAX	FILLED BY E-MAIL
MA FREE	59			59	17	12
MA \$	8			8		
REGION 8	8			8		
REGION 8 \$	24			24	2	4
OUTSIDE REGION 8 FREE	10			10	1	1
OUTSIDE REGION 8 \$	61			61	5	13
COMMERCIAL VENDORS						
<b>TOTAL BORROWED</b>	<b>170</b>			<b>170</b>	<b>25</b>	<b>30</b>
MONOGRAPHS BORROWED	3			3		
LDX REQUESTS FILLED						
LDX Referred to DOCLINE	16			16		15

In this way the QuickDOC Reports can be used to fill out the MAHSLIN annual ILL report. We've just done Borrow here, but the Lend side follows a similar pattern.